



## New Customer Application Process for Transmission Service, Version 6

Effective: 1/25/13

This Business Practice describes the requirements that an Eligible **Customer**<sup>1</sup> must meet, along with steps to follow in order to become a BPA Transmission Services' Customer who may request transmission service.

Version 6 replaces forms:

- Substitute W9e: Request for Taxpayer Identification Number and Certification dated 03/2007 and BPA form 2440.02ae New Vendor Profile Request dated 10/2006
- W-8BEN: Certificate of Foreign Status of Beneficial Owner for United States Tax Withholding

with the following updated forms in Section D under Forms:

- Substitute IRS form W9e: Request for Taxpayers Identification Number and Certification dated 01/2013 and BPA form 4220.01ae: Certification and New Vendor Profile Request dated 01/2013 (both forms are in one attachment)
- BPA form 4220.01f: Federal Tax Withholding for Foreign Entities Applied to Payments dated 01/13 and BPA form 4220.01b: New Foreign Vendor Profile Request dated 01/13 (both forms are in one attachment)

### A. Application Information Required

1. An Eligible Customer must establish itself as a Customer prior to requesting Transmission Service. To initiate this process, the Eligible Customer must call BPA Transmission Services (360 - 619 - 6016) and request the assignment of a BPA Transmission Services Account Executive who will assist in the application process.
2. An Eligible Customer who is not yet a BPA Transmission Services Customer and who wishes to request Transmission Service must submit to BPA Transmission Services the information listed below. BPA Transmission Services requires separate Service Agreements for Point-to-Point Transmission Service (PTP) and Network Integration (NT) Transmission Service.

---

<sup>1</sup>Any customer taking service under Use of Facilities (UFT), Formula Power Transmission (FPT), Integration of Resources (IR), Part II or Part III of the OATT.

---

- a. A D-U-N-S® number from Dun and Bradstreet at <https://eupdate.dnb.com/requestoptions.asp>. This number will be used to identify the Customer electronically when submitting a Transmission Service Request (TSR<sup>1</sup>) on OASIS<sup>2</sup>.
- b. If the Eligible Customer is seeking PTP Service or NT Service and is required to submit transmission schedules and e-Tags then they must register with the NAESB Electric Industry Registry (EIR) at: <http://www.oasis.oati.com> as a Transmission Contract Holder (TCH) or Purchase-Selling Entity<sup>3</sup> (PSE) if applicable. This step must be completed before step c.
- c. Register to obtain an Open Access Technology International, Inc. (OATI<sup>4</sup>) digital certificate. Access the OATI site at [www.oatioasis.com/bpat/](http://www.oatioasis.com/bpat/) and click the registration option or contact OATI at 763 - 201 - 2000.
- d. Complete, print, sign, and submit all Customer application forms listed in the following chart, if applicable. The forms are available under Additional Information/Forms below, except the Customer Data Entry (CDE)<sup>5</sup> Agreement. The CDE<sup>6</sup> Agreement is available from your Account Executive.

Form:	Required For:
Transmission Credit Application	All Customers
Customer Data Entry (CDE) Agreement	Customers that will be using CDE
Transmission Customer Contact Information	All Customers
W-8BEN Certificate of Foreign Status of Beneficial Owner for US Tax Withholding	Customers with a parent company headquartered in a foreign country
Substitute IRS Form W9e Request for Taxpayer Identification	Customers headquartered in the United States As a Federal Agency Bonneville Power Administration is

<sup>1</sup>Transmission Service Request

<sup>2</sup>Open Access Same-Time Information System

<sup>3</sup>A load, generator, generation provider, Transmission Customer, or other party.

<sup>4</sup>Open Access Technology International System

<sup>5</sup>A Transmission Services access point that allows a customer to obtain information pertaining to its Ancillary Services, Loss Return obligations, portfolio manager, and contract portfolio manager.

<sup>6</sup>Customer Data Entry

Form:	Required For:
tification Number and Certification	required to wire all Customer refunds so this form must include bank wiring account information (under Vendor Express Enrollment)

3. Submit all application forms described above to the assigned Transmission Account Executive, using one of the following methods:

US Postal Service:	Bonneville Power Administration Transmission Marketing and Sales - TSE-TPP-2, P.O. Box 61409, Vancouver, WA 98666-1409
Overnight Delivery Service:	Bonneville Power Administration Transmission Marketing and Sales - TSE-TPP-2 7500 NE 41st Street, Suite 130 Vancouver, WA 98662 - 7905 Required Phone Number (360) 619 - 6016
Facsimile (fax):	360 - 619 - 6940
Email:	<a href="mailto:TxRequests@bpa.gov">TxRequests@bpa.gov</a> . Enter APPLICATION in the subject line of the email. This email address provides an automated reply indicating that the application was received.

**Note:** If the Eligible Customer returns the above forms by fax or email, BPA Transmission Services must receive the original signed hard copies of the forms within five Business Days after the date of the fax or email.

## B. Execution of a Transmission Service Agreement

1. After an Eligible Customer meets all of the requirements above, BPA Transmission Services will offer the Customer a Service Agreement (SA) which includes applicable Exhibits (See Attachments A and F of the [OATT](#) for examples of PTP and NT contracts and Exhibits).

2. An Eligible Customer must sign and return the hardcopy SA to BPA Transmission Services at the address listed above by **Close of Business**<sup>1</sup> on the 15th calendar day after the **Date of Tender**<sup>2</sup>. the due date for the SA will be included in a cover letter accompanying the SA.
3. Complete and submit Notification of **Real Power Loss Return**<sup>3</sup> Type form to your Account Executive and have approval. The form is under Additional Information/Forms below.
4. After the Eligible Customer meets all requirements above and receives an original signed SA by BPA Transmission Services and the Customer, it will be able to submit a Transmission Service Request (TSR) through OASIS. See the Requesting Transmission Service Business Practice.

## C. Additional Information

### Policy Reference

- [OATT](#): Sections 1.12, 17, 29, Attachment A, Attachment F

### Related Business Practices

- Creditworthiness
- Real Power Loss Return
- Requesting Transmission Service
- **Reservation Agent**<sup>4</sup>
- **Scheduling Agent**<sup>5</sup>

### Forms

- [Transmission Credit Application](#)
- [Notification of Real Power Loss Return Type](#)

---

<sup>1</sup>5:00 p.m. Pacific Prevailing Time

<sup>2</sup>The day that the Customer receives an offer for transmission service from Transmission Services. If that day is a Saturday, Sunday or Federal Holiday, the Date of Tender is the next Business Day.

<sup>3</sup>The return of Real Power Losses which were replaced with federal generation.

<sup>4</sup>An entity authorized to submit and process Transmission Service Requests (TSR) on behalf of the Customer. This entity is a registered customer of Open Access Technology International, Inc. (OATI).

<sup>5</sup>An entity designated by the Customer to prepare and submit transmission schedules and associated forecasts on behalf of that Customer.

- [Transmission Customer Contact Information](#)
- [BPA form 4220.01f: Federal Tax Withholding for Foreign Entities Applied to Payment dated 01/13 and BPA form 4220.01b: New Foreign Vendor Profile Request dated 01/13 \(both forms are in one attachment\)](#)
- [Substitute IRS form W9e: Request for Taxpayers Identification Number and Certification dated 01/2013 and BPA form 4220.01ae: Certification and New Vendor Profile Request dated 01/2013 \(both forms are in one attachment\)](#)

## Version History

Version 6	<p>1/25/13 Version 6 replaces forms:</p> <ul style="list-style-type: none"> <li>• Substitute W9e: Request for Taxpayer Identification Number and Certification dated 03/2007 and BPA form 2440.02ae New Vendor Profile Request dated 10/2006</li> <li>• W-8BEN: Certificate of Foreign Status of Beneficial Owner for United States Tax Withholding</li> </ul> <p>with the following updated forms in Section D under Forms:</p> <ul style="list-style-type: none"> <li>• Substitute IRS form W9e: Request for Taxpayers Identification Number and Certification dated 01/2013 and BPA form 4220.01ae: Certification and New Vendor Profile Request dated 01/2013 (both forms are in one attachment)</li> <li>• BPA form 4220.01f: Federal Tax Withholding for Foreign Entities Applied to Payments dated 01/13 and BPA form 4220.01b: New Foreign Vendor Profile Request dated 01/13 (both forms are in one attachment)</li> </ul>
Version 5	<p>11/13/12 Version 5 replaces NERC's online TSIN registration in A.2.b with the NAESB Electric Industry Registry (EIR) as the sole registry source. The TSIN Registry site has been decommissioned effective November 13, 2012 making the NAESB Electric Industry Registry (EIR) the official source of registry data.</p>
Version 4	<p>05/01/12 Version 4 includes the requirement of new customers to register with the Electric Industry Registry (EIR) in addition to TSIN Registry in step A.2.b. The TSIN Registry requirement will be decommissioned and will occur after successful completion of a parallel operations period. This date will be determined by NAESB and result in a revision to this business practice.</p>
Version 3	<p>11/30/10 Version 3 of this business practice includes the following update due to Customer Data Entry (CDE) replacing Customer Web Interface (CWI):</p> <ul style="list-style-type: none"> <li>• Deleted step 3.2.4.3</li> </ul>
Version 2	<p>07/30/10 Version 2 of this business practice includes the following changes:-Step 3.2.4.7 moved to step 3.2.4.6, -Step 3.2.4.6 moved to step 3.2.4.6.1 and added "If the Eligible Customer is head-quartered in a foreign country, submit the" to the beginning of the step and "instead of the Substitute IRS Form W9e." to the end of the step for clarity. Also, "a parent company of" was deleted.</p>
Version 1	<p>04/10/09 The New Customer Application Process for Transmission Service, version 1, Business Practice is the result of separating the Application Process for Transmission Service into two business practices: New Customer Application Process for Transmission Service and Requesting Transmission Service. This Business Practice replaces the Becoming a New BPA Transmission Services Customer web page and includes all the web page information.</p>